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Germany

Wine

Marketing Annual

2001

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Report Highlights:
German wine market continues to grow in 2001. German consumers favor red wines. U.S. suppliers can take advantage of this trend and increase sales to Germany to 205,700 hectoliters in CY 2000. Further strong growth is reported for CY 2001. German wine producers are also switching over to red wine production, achieving a production share of 26 percent for red wines in 2001. The 2001 grape must harvest in Germany was somewhat below average in volume (9.2 million hl) but of above average quality.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Berlin [GM1], GM

Executive Summary

In 2001, German vintners harvested a smaller crop of about 9.2 million hectoliters of grape must. First indications are that the must quality is above average. Due to climate and geography, German wine production can vary significantly from year to year, although the new stricter maximum harvest regulation based on the EU wine regime should limit annual production fluctuations. About 74 percent of the German wines are delicate white wines. Following the general consumer trends, German vintners increased their red wine area continuously over the past ten to fifteen years to about 26 percent in 2001. About fifty percent of replantings are in red wine varieties.

Total calculated wine consumption in MY1999/2000 (Sep/Aug) is estimated at 19.6 million hectoliters, 51 percent thereof from imported sources. Germany is actually the world’s biggest importer of wine, mainly from other EU countries. U.S. exports of mainly high quality red wines are growing steadily. Total U.S. wine shipments to Germany amounted to 205,700 hectoliters in CY 2000 compared to 146,800 hectoliters in 1999. Despite the strength of the dollar versus the Euro, U.S. wine exports to Germany continue to grow in 2001. U.S. wines are strongly competing with other New World wines from Australia, New Zealand, Chile, Argentina and South Africa.

Germany exported about 2.4 million hectoliters of wine in 2000, mainly to other EU countries. About six percent of German exports are to the United States. On the export markets, Germany is strongly promoting Riesling for the medium and higher price segment. The German Wine Institute spends about DM 5.5 million ($2.5 million) for export promotions.

Note: In recent years the U.S.$/ DM exchange rate has been as follows:

1995: $1 = DM 1.4338	1998: $1 = DM 1.7582
1996: $1 = DM 1.5037	1999: $1 = DM 1.8351
1997: $1 = DM 1.7348	2000: $1 = DM 2.1176
	Sep 2001: $1 = DM 2.1467
	$1 = Euro 1.0976

Production

In the fall of 2001, German vintners harvested about 9.2 million hectoliters of grape must compared to 10.1 million in 2000 and 12.3 million hectoliters in 1999, see Table 1 + 2. Due to a surprisingly sunny October, there is a good possibility of above average quality wine. The wide climatic variances in this northern production region can cause wine quality to vary significantly from year to year.

Germany is the sixth largest wine producer in the EU, growing grapes on about 104,000 hectares. Its production area is divided in 12 different growing regions. The names of these regions are used for region of origin labeling. The commercial production of wine outside of the designated regions is not permitted. Based on the rules of the EU wine regime, the German wine law allows regional authorities to stipulate which grape varieties can be produced in the production regions. The majority of grapes produced in Germany are white wine varieties, 74 percent in 2000, with Riesling and Mueller-Thurgau in the lead. Both varieties are grown on about 20 percent of the grape area. Of growing popularity are White Burgundy and Chardonnay grapes at the disadvantage of Mueller-Thurgau. Red wine is only planted to about 26 percent of the grape area, but its production area is growing by about 1,500 to 2,000 hectares every year. The most favored red grape varieties are Blue Burgundy, Dornfelder and Blue Portugese. For replantings, the most favored grape during the past five years was the Dornfelder variety, see Table 3.

To assist vintners to better meet consumer demand, the EU offers a restructuring program subsidized with Euro 13.78 million for wine year 2001/02 (Sep/Aug). Under this program, a total of 1,176 ha may be replanted with new grape varieties other than Mueller-Thurgau, Kener, Bacchus, Morio-Muskat or other high yielding varieties which are of little interest to the consumer. In MY 2000/2001, the EU provided Euro12.61 million for the restructuring of 1,624 hectares of grape area in Germany. The total annual replanting rate is estimated at about four percent since plants are kept in production for 20 to 25 years.

As a result of the large grape harvest in 1999, German wine prices dropped to record lows in 2000 and 2001. However, this price drop mainly affected bulk white wine producers, about 40 percent of the production. Direct marketing vintners do not seem to face such low prices - growing grapes is simple, but making and marketing a good wine is a science. Prices for bulk wines of less favored white varieties dropped to about DM 40 per hectoliter; prices for bulk Dornfelder (red) are recorded at DM 300 to DM 350. Producers of white bulk wine also seem to have problems selling their product to mass sparkling wine producers. These companies still prefer to import their raw wine from low priced Mediterranean and eastern European sources. The disadvantages faced by domestic vintners are their small operation size and consequent inability to offer large volume.

About two percent of the German wine production is organic wine. This special market niche is expected to grow steadily over the near future.

Consumption

The boom in wine consumption continued through the third quarter of 2001. While demand for all other alcoholic beverages is trending down, wine is gaining popularity since it is a stylish positive-image product, see Table 4. Good quality combined with interestingly designed bottles and labels makes wine attractive to all alcohol beverage consuming age classes. Per capita consumption in 2000 was estimated at about 19.0 liters. This number does not include sparkling wine, which lost market share in 2000 and 2001. A consumer panel revealed that 68.5 percent of the households are at least irregularly buying wine. This is a continuous increase over the past four years.

The major winners in the upward trend are red wine and other imported new world wines. The German wine market share has actually dropped under 50 percent to the dismay of the average German vintner. (Table 5) The major reason for the market share loss of German wines is that Germany is still predominantly a white wine producing country. Red and rose wines are predominantly coming from imported sources. By converting their vineyards to red wine varieties German vintners intend to participate in this popular red wine trend. The big winners in the wine market, the new-world wines, are generally selling at above average prices.

One of the reasons why German wines lost market share to imported high quality wines is the complicated German wine grading and labeling system, which is not fully understood by many customers (see GAIN Report GM9069). It, in particular, limits the marketing opportunities on the shelves of the large food discounters who handle about 70 percent of German wine sales; another 20 percent is sold directly by the vintners. Imported wines are predominantly traded through the food retailers. To better position domestic wines on the retail shelves, the German Wine Institute has developed two new wine categories, ‘Classic’ and ‘Selection’ type wines, see GAIN Report GM0041. Vintners contract with the German Wine Institute for the use of the Classic and Selection label. The German Wine Institute will control the production methods and the quality of the wine sold under this label. In 2001, the first Classic type wines were put on the market, somewhere around 20,000 to 30,000 hectoliters. For CY 2002, an increase to more than 120,000 hectoliters is expected. The Classic line targets specifically bulk wine producers to generally improve product quality and in the longer term the image of German wines. The target price range for Classic wines is between DM 7.00 and DM 10.00 per bottle of 0.75 liters. The target price for selection wine is between DM 15.00 and DM 20.00. The German Wine Institute claims that the retail trade is strongly interested in the Classic line. However, the target is not only the domestic market, the Germans also intend to promote Classic and Selection in their export markets.

Sparkling wine consumption had reached a high in 1999 due to the millennium celebration. Demand for sparkling wine, including champaign, has fallen by about ten percent in 2001.

Trade

Germany is the world's most important import market for wine. More than 50 percent of Gemany's consumption is imported wine. Total imports in CY 2000 dropped by seven percent to 11.5 million hectoliters compared to 1999. According to official German trade statistics, the major loser in the market was France with minus 14 percent followed by Italy, minus 12 percent. The negative trend for Italy continued also in 2001, while France was able to stabilize its shipments. Other important volume suppliers of wines are the CEE countries of Bulgaria, Macedonia, Hungary and Romania. These four countries exported a bit more than one million hectoliters of wine to Germany in 2000. However, they primarily supply the low price end of the market with relatively sweet wines.

The winners in the market during the past several years are the New World wines from the United States, Australia, Chile, Argentina and South Africa. However, the total market share of these five countries still remains at 2.0 to 2.5 percent. California and other New World wines have captured space on many of the retail shelves. They are no longer exotic products. Most important, they are selling at above average prices and perfectly satisfy consumers needs and desires. About 85 percent of the U.S. wines are red wines, fortunately mostly high quality wines. While U.S. red wine shipments to Germany make up six percent of total import volume, the value of these imports adds up to 14.5 percent. German consumers expect high quality when they purchase California wines. Total U.S. wine exports to Germany amounted to 205,700 hectoliters in CY 2000; further strong growth is reported for 2001, see Table 6 ff.

German wine exports amount to 20 to 25 percent of domestic production. In 2000, these were 2.4 million hectoliters. The leading markets are the United Kingdom and the Netherlands followed by the United States. Germany is working hard to improved its image as a supplier of lower quality and lower priced sweet wines. The export marketing focus is on dry Riesling wine which goes good with a meal. The German Wine Institute spends about DM 5.5 to 6.0 million for export promotions annually. This is about half of its total promotion funds.

Stocks

Due to the large grape harvest in 1999, German wine stocks had built up to 16.2 million hectoliters by the end of August 2000. Data for August 2001 are not yet available. Low bulk wine prices indicate that stocks are still far too high, possibly at and slightly above August 2000 levels. In 2001, German vintners sold 300,000 hectoliters of wine into the EU distillation program for drinking alcohol. Another 180,000 hl were distilled for industrial purposes under an EU emergency distilling program. Initially, Germany had applied for the opportunity to distill up to one million hl of low quality wines. Vintners and distillers did not find the program economically attractive enough to conclude distillation contracts. No new emergency distillation programs for German vintners are being discussed.

Policy

The issue of mutual recognition of enological practices is intensively discussed in the German wine making industry. There are hardliners arguing that the EU should stick to their approved and traditional practices as laid down in the EU wine regime but there are also signs for compromise. Since the EU exports by far more wine than they import it might be economically wise to come to a compromise. The German wine producers seem to favor setting up a positive list of allowed enological practices and labeling requirements which should at first be bilaterally negotiated with the United States. After conclusion of such a pilot agreement the EU should stasrt negotiations with other New World wine producing countries.

Marketing

California wines have an excellent reputation in the German market and the consumers seem to be willing to pay an above average price. Other American wine growing regions should also test the German market and take advantage of the good California reputation.

Generic marketing for the German wine industry is conducted by the German Wine Institute, charged with marketing and promoting the quality of German wine within Germany and around the world.. It receives most of its funds as royalties from German wine growers and processors. The annual budget totals approximately US$ ten million (DM 22 million) (see also GAIN Report GM9969). Overall, the German wine marketing aims to improve the image of German wine, and promote German wine in the high and medium priced market segments. These promotional efforts have the potential to also generically support marketing opportunities of imported high quality wines. Promotional efforts are particularly targeting the lucrative medium-price segment of the wine market (between $5 and $9 per bottle), a segment in which German wines are under represented.. Besides the traditional export markets in Europe, North America and Japan, new markets in Eastern Europe, South America and Asia are targeted.

Statistical Section

Table 1: German Wine Production by Type and Quality, in 1,000 hl						
Calender Year	1996	1997	1998	1999	2000	2001*
White Wine	6,749	6,481	7,936	9,042	6,819	6,100
Table Wine	171	244	503	1,354	708	
Quality Wine	4,670	2,953	5,111	4,648	3,984	
Quality Wine w/ Spec. Attributes	1,907	3,282	2,323	3,040	2,127	
Red Wine	1,842	1,829	2,684	3,081	3,032	3,100
Table Wine	8	9	26	33	69	
Quality Wine	1,693	1,422	2,436	2,706	2,736	
Quality Wine w/ Spec. Attributes	140	397	222	342	227	
Total Wine	8,591	8,310	10,620	12,123	9,852	9,200
Table Wine	179	254	529	1,387	777	
Quality Wine	6,364	4,376	7,547	7,354	6,720	
Quality Wine w/ Spec. Attributes	2,047	3,680	2,545	3,382	2,355	
* Preliminary						
Source: German Wine Growers' Association						

Table 2: German Wine Most Production by Type and Quality, in 1,000 hl					
Calender Year	1997	1998	1999	2000	2001*
White Wine	6,614	8,091	9,119	7,005	6,100
Table Wine	40	69	32	103	
Quality Wine	1,939	4,271	3,680	3,592	
Quality Wine w/ Spec. Attributes	4,635	3,751	5,408	3,311	
Red Wine	1,881	2,742	3,167	3,076	3,100
Table Wine	11	44	11	93	
Quality Wine	553	1,947	1,790	1,847	
Quality Wine w/ Spec. Attributes	1,316	751	1,366	1,136	
Total Wine	8,494	10,834	12,286	10,081	9,200
Table Wine	51	114	44	195	
Quality Wine	2,493	6,218	5,469	5,439	
Quality Wine w/ Spec. Attributes	5,950	4,501	6,773	4,447	
* Preliminary					
Source: German Wine Growers' Association					

Table 3: Grape Variety Distribution, 1,000 hectares					
	1991	1997	1998	1999	2000
White Varieties	85392	82186	80386	79081	77525
Mueller-Thurgau	24600	22069	21252	20667	20024
Riesling	22013	22774	22631	22350	22117
Silvaner	7585	7188	7018	6859	6691
Kerner	7667	7263	7011	6828	6543
Bacchus	3490	3396	3316	3282	3209
Rulaender	2509	2538	2565	2637	2769
Scheurebe	3781	3418	3284	3126	2948
White Burgundy	1282	2029	2165	2396	2593
Chardonnay			467	531	610
other white	12465	11511	11144	10936	10021
Red Varieties	18385	22057	23540	25152	27200
Blue Burgundy	6449	7745	8204	8643	9255
Blue Portogese	4320	4660	4718	4878	5026
Dornfelder	1509	2599	3218	3765	4372
Trollinger	2439	2547	2551	2530	2593
Black Riesling	1987	2187	2228	2289	2405
other red	1681	2319	2621	3047	3594
Total	103777	104243	103926	104233	104725
Source: German Wine Growers' Association					

Table 4: German Beverage Consumption, Liter per Capita					
	1996	1997	1998	1999	2000
Alcoholic Beverage	161.3	160.3	156.3	156.8	155.0
- Beer	131.9	131.2	127.5	127.5	125.5
- Wine	18.3	18.1	18.1	18.5	19.0
- Sparkling Wine	4.8	4.9	4.7	4.9	4.6
- Spirits	6.3	6.1	6.0	5.9	5.9
Non-alcoholic Bev.	230.9	239.9	240.7	248.4	245.7
- Mineral Water	97.0	100.0	100.1	104.2	102.1
- Soft Drinks	92.7	98.7	99.6	103.7	103.1
- Fruit Juice	41.2	41.2	41.0	40.5	40.5
Hot Drinks + Other	271.1	265.9	271.9	276.0	280.8
- Coffee	163.5	160.0	159.1	159.4	165.0
- Coffee Substitute	3.3	3.4	3.2	3.0	7.0
- Black Tea	24.7	24.8	30.2	31.5	28.0
- Milk	79.6	77.7	79.4	82.1	80.8
Grand Total	663.3	666.1	669.9	681.2	681.5
Source: Ifo Institut Muenchen - Weinbauverband - Zahlen, Daten, Fakten					

Table 5: Wine Market Developments in Germany					
	Unit	1997	1998	1999	2000
Wine Consuming Households	%	63	66.5	66.5	68.5
Market Share					
- German Wine	%	51.8	49.1	49.7	48.7
- Import Wine	%	48.2	50.9	50.3	51.3
- White Wine	%	48.8	47.8	46.7	43.2
- Red + Rosee Wine	%	51.2	52.2	53.3	56.8
- Wine in 0.75 l Bottles	%	48.3	49.1	51.1	52.2
- German Wine in 0.75 l Bottles	%	36.8	40.4	40.4	40.1
Average Prices					
- All Wine	DM/l	5.91	5.8	6.06	6.09
- German Wine	DM/l	6.4	6.55	6.55	6.5
- Imported Wine	DM/l			5.57	5.71
- White Wine	DM/l	5.86	5.59	5.72	5.71
- Red Wine	DM/l			6.49	6.57
Trade Chanels					
- Vintners + Coops	%	20.8	19.5	19.3	18.7
- Super Markets	%	23.3	23.4	24.2	23.9
- Speciality Stores	%	7.7	6.3	7.4	7.2
- Discount Stores	%	30.8	35.3	35.8	37.2
Source: German Wine Institute, Annual Report					

Table 6: German Imports of Wine, 1,000 hl, Million DM								
	1998		1999		2000		2001*	
Quality White Wine								
Total	1,187.0	487.4	1,011.9	425.2	972.5	395.3	653.9	270.6
Intra-EU	1,185.0	486.8	1,011.8	425.1	972.0	395.1	650.3	269.3
Extra-EU	2.0	0.6	0.0	0.0	0.5	0.1	3.5	1.3
United States	0.7	0.3	0.0	0.0	0.2	0.0	0.1	0.1
Other White Wine								
Total	3,876.7	461.3	3,849.0	464.5	3,323.4	414.1	1,912.3	260.9
Intra-EU	3,475.1	364.6	3,461.4	365.3	2,913.6	295.1	1,591.4	184.6
Extra-EU	401.7	96.7	387.6	99.3	409.8	119.0	320.8	76.3
United States	29.4	16.5	29.7	16.8	29.6	18.5	24.3	11.7
Quality Red Wine								
Total	2,376.1	1,163.6	2,414.0	1,231.7	2,302.3	1,127.9	1,457.8	723.3
Intra-EU	2,376.1	1,163.6	2,414.0	1,231.6	2,301.9	1,127.7	1,455.4	721.9
Extra-EU	0.0	0.0	0.0	0.0	0.3	0.3	2.5	1.4
United States	0.0	0.0	0.0	0.0	0.0	0.0	1.7	1.1
Other Red Wine								
Total	3,508.4	653.6	3,551.2	724.4	3,564.5	786.0	2,498.0	559.6
Intra-EU	2,262.5	385.7	2,286.4	404.3	2,072.1	371.3	1,293.0	261.5
Extra-EU	1,245.9	267.9	1,264.8	320.2	1,492.4	414.6	1,205.0	298.1
United States	81.7	49.7	116.9	74.1	175.7	110.0	150.8	81.3

German Imports of Wine, 1,000 hl, Million DM								
Vermouth	1998		1999		2000		2001*	
Total	492.6	60.9	517.4	66.0	522.6	47.1	202.3	22.5
Intra-EU	242.5	43.4	283.9	50.9	317.4	34.3	95.4	16.1
Extra-EU	250.1	17.6	233.5	15.1	205.2	12.8	106.9	6.5
United States	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Wine Cooler								
Total	185.9	29.1	208.3	30.4	112.0	21.3	162.9	18.3
Intra-EU	169.7	22.1	196.7	24.0	101.3	15.8	154.9	15.0
Extra-EU	16.2	7.1	11.6	6.4	10.7	5.5	8.1	3.3
United States	4.1	1.8	3.0	1.7	2.5	1.4	1.1	0.5
Liquor/Wine Spirits								
Total	182.4	67.0	150.7	59.5	120.5	48.5	99.5	37.5
Intra-EU	181.6	66.4	150.0	58.9	119.3	47.8	98.4	36.5
Extra-EU	0.8	0.6	0.9	0.6	1.1	0.7	1.1	1.0
United States	0.0	0.2	0.0	0.2	0.0	0.2	0.3	0.4
Sparkling Wine / Base Wine for Sparkling Wine								
Total	1,187.0	777.1	1,393.5	923.2	1,218.5	756.2	801.4	415.5
Intra-EU	1,168.6	764.0	1,375.0	911.5	1,194.9	740.3	794.5	411.3
Extra-EU	18.4	13.1	18.5	11.7	23.6	15.9	7.0	4.2
United States	0.3	0.3	0.0	0.2	0.1	0.2	0.1	0.2
Total Wine								
Total	12,996.2	3,700.0	13,096.0	3,924.9	12,136.3	3,596.3	7,788.2	2,308.2
Intra-EU	11,061.1	3,296.4	11,179.0	3,471.6	9,992.5	3,027.3	6,133.3	1,916.2
Extra-EU	1,935.1	403.7	1,917.1	453.4	2,143.7	569.1	1,654.9	392.0
United States	116.4	68.8	149.8	93.1	208.2	130.5	178.7	95.2
* Jan/Aug 2001								
Source: Federal Statistics Office								

Table 7: German Exports of Wine, 1,000 hl, Million DM								
	1998		1999		2000		2001*	
Quality White Wine								
Total	1,512.7	524.2	1,426.6	480.6	1,479.7	442.4	893.5	281.8
Intra-EU	1,093.0	311.7	1,023.5	276.9	1,090.5	240.9	633.0	151.4
Extra-EU	418.3	210.5	401.8	201.4	387.8	198.9	259.7	128.8
United States	98.3	55.4	107.9	58.4	125.5	72.1	79.6	46.5
Other White Wine								
Total	405.9	87.0	520.5	97.5	513.5	88.0	277.2	53.4
Intra-EU	359.3	74.1	484.2	87.4	459.4	74.7	241.2	43.5
Extra-EU	46.1	12.2	35.8	9.6	53.9	12.8	35.8	9.7
United States	1.4	0.6	1.6	0.6	1.2	0.6	1.3	0.5
Quality Red Wine								
Total	71.7	53.8	54.1	57.4	72.5	68.1	66.6	49.1
Intra-EU	18.6	25.9	28.6	33.6	35.0	33.3	42.2	28.4
Extra-EU	51.4	24.4	24.0	20.4	36.2	31.1	23.5	18.2
United States	2.0	1.4	1.6	1.9	2.7	2.9	1.9	2.1
Other Red Wine								
Total	146.9	38.2	143.9	43.7	187.6	60.7	136.7	43.9
Intra-EU	104.0	24.2	109.4	28.1	143.4	40.5	99.7	28.9
Extra-EU	42.3	13.4	34.1	14.9	43.5	19.1	36.6	14.3
United States	2.4	0.9	3.0	1.2	3.4	1.5	1.4	0.9

German Exports of Wine, 1,000 hl, Million DM								
	1998		1999		2000		2001*	
Vermouth								
Total	150.5	26.3	138.7	28.5	123.4	25.3	61.6	13.2
Intra-EU	122.9	19.5	127.3	24.2	105.7	18.5	52.4	8.5
Extra-EU	26.7	6.1	10.6	3.6	16.7	6.0	8.5	4.0
United States	1.5	0.4	1.2	0.3	1.6	0.5	0.3	0.1
Wine Cooler								
Total	101.1	24.8	168.7	38.9	131.7	32.4	87.6	18.7
Intra-EU	75.4	17.9	132.9	31.5	99.5	22.5	70.1	13.4
Extra-EU	25.6	6.9	35.7	7.3	32.0	9.7	17.5	5.3
United States	0.3	0.2	0.3	0.2	0.4	0.4	0.4	0.2
Liquor/Wine Spirits								
Total	11.8	7.5	17.5	11.4	14.8	9.9	13.2	8.6
Intra-EU	8.8	5.3	16.5	10.3	14.1	8.8	12.6	7.7
Extra-EU	2.4	1.2	0.6	0.5	0.6	0.5	0.4	0.5
United States	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Sparkling Wine / Base Wine for Sparkling Wine								
Total								
Intra-EU	123.7	81.1	171.7	126.4	145.5	76.6	71.5	46.7
Extra-EU	78.8	52.9	115.7	86.4	93.5	43.3	50.5	31.4
United States	43.4	23.5	54.4	34.7	50.7	28.7	20.2	12.4
	3.4	1.4	5.0	6.0	5.5	3.4	3.5	1.6
Total Wine								
Total	2,524.2	843.0	2,641.6	884.5	2,668.9	803.4	1,607.9	515.5
Intra-EU	1,860.8	531.5	2,038.1	578.4	2,041.2	482.4	1,201.8	313.3
Extra-EU	656.2	298.2	597.1	292.4	621.3	306.9	402.1	193.3
United States	109.3	60.3	120.5	68.8	140.4	81.4	88.4	51.9
* Jan/Aug 2001								
Source: Federal Statistics Office								

Table 8: German Wine Imports by Country of Origin								
	1998		1999		2000		2001*	
	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000 hl	Mill. $
U.S.A.	116.4	39.1	146.8	49.8	205.7	61.0	177.3	43.1
Italy	5,005.5	694.1	5,835.1	741.1	5,111.3	547.4	2,948.8	372.7
France	3,314.5	803.0	2,991.1	753.2	2,576.3	543.1	1,649.1	301.9
Spain	2,167.8	286.9	1,302.9	272.2	1,317.4	247.3	931.8	141.8
Greece	223.3	34.9	228.6	35.1	200.3	26.8	136.6	16.5
Austria	145.7	23.4	229.9	24.3	254.5	20.6	144.9	12.7
Hungary	224.5	23.4	201.4	20.9	246.2	22.6	124.2	10.4
Romania	189.6	12.5	157.9	11.9	132.3	7.8	146.0	8.1
Bulgaria	256.3	22.5	212.0	18.3	196.1	13.4	140.7	9.3
Mazedonia	437.9	22.7	415.7	21.3	476.8	18.8	401.2	14.4
Tunesia	-	-	57.5	4.0	53.0	3.0	34.5	2.0
Chile	137.4	30.3	170.8	36.6	212.0	42.6	207.9	29.3
South Africa	77.5	17.9	91.4	20.5	132.4	27.4	80.5	16.0
Portugal	139.5	25.6	108.5	24.3	106.1	19.5	63.6	13.1
Argentina	35.1	5.8	36.9	6.5	43.2	8.1	25.3	4.4
Australia	46.6	15.3	79.7	24.6	129.7	34.3	95.6	24.0
Other	478.6	45.8	104.3	21.6	108.4	22.2	114.9	14.7
World	12,996.2	2,103.2	12,370.4	2,086.3	11,501.7	1,666.0	7,422.9	1,034.4
* Jan/Aug 2001								
Source: Federal Statistics Office								

Table 9: German Wine Exports by Major Countries of Destination								
	1998		1999		2000		2001*	
	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000 hl	Mill. $
U.S.A.	109.3	34.3	119.1	37.2	138.3	38.0	87.8	23.6
Great Britain	1,003.2	158.4	999.2	140.8	1,000.3	101.4	538.2	58.4
Netherlands	297.5	48.7	276.2	47.9	285.5	33.6	194.4	21.9
Sweden	99.4	17.9	101.5	18.5	115.8	17.4	83.3	12.2
Japan	195.7	62.4	153.1	51.8	118.0	35.2	66.7	19.3
France	73.9	15.9	93.6	19.0	141.9	15.2	60.0	10.8
Bel/Lux	134.7	20.6	81.7	18.4	77.3	11.5	6.2	8.3
Denmark	103.1	12.5	88.0	10.1	80.0	7.1	54.1	5.0
Austria	63.2	13.0	60.1	17.3	54.3	10.8	27.9	6.2
Canada	48.7	11.6	49.3	12.1	50.4	11.6	29.4	6.9
Ireland	30.4	4.9	27.5	3.9	17.9	2.2	12.4	1.9
Poland	24.1	4.0	27.2	4.7	30.4	4.3	19.9	2.6
Norway	41.2	8	44.0	8.3	43.5	7.0	33.1	5.3
Switzerland	15.1	6.1	14.0	7.7	14.6	8.8	9.4	4.6
Latvia	6.8	1.1	9.2	3.5	22.2	5.8	23.0	4.4
Other	278.0	59.8	190.5	44.2	223.3	42.0	213.0	28.7
World	2,524.3	479.2	2,334.2	445.3	2,413.8	352.1	1,458.7	220.1
* Jan/Aug 2001								
Source: Federal Statistics Office								

Table 10: Average Prices for Imported Wine								
	1998		1999		2000		2001*	
	DM/L	$/L	DM/L	$/L	DM/L	$/L	DM/L	$/L
	Quality White Wine							
WORLD	4.11	2.34	4.20	2.29	4.06	1.92	4.22	1.92
U.S.A.	4.28	2.44	65.00	35.42	6.36	3.00	5.87	2.75
INTRA-EU-15	4.11	2.34	4.20	2.29	4.06	1.92	4.23	1.92
CHILE	4.52	2.57	-	-	3.75	1.77	-	-
SOUTH AFRICA	4.02	2.29	10.00	5.44	15.00	7.05	-	-
	Other White Wine							
WORLD	1.19	0.68	1.21	0.66	1.25	0.59	1.35	0.61
U.S.A.	5.60	3.19	5.66	3.08	6.24	2.95	4.93	2.23
INTRA-EU-15	1.05	0.60	1.06	0.58	1.01	0.48	1.16	0.52
CHILE	4.11	2.34	4.22	2.30	4.85	2.29	3.50	1.60
SOUTH AFRICA	3.31	1.88	3.17	1.73	3.36	1.59	3.18	1.44
AUSTRALIA	4.69	2.67	4.27	2.33	4.61	2.18	4.52	2.04
	Quality Red Wine							
WORLD	4.90	2.79	5.10	2.78	4.90	2.31	5.03	2.30
U.S.A.	-	-	32.50	17.68	13.87	6.55	6.20	2.90
INTRA-EU-15	4.90	2.79	5.10	2.78	4.90	2.31	5.02	2.30
CHILE	8.57	4.87	5.71	3.11	6.05	2.86	3.86	1.81
SOUTH AFRICA	15.00	8.53	10.00	5.44	15.00	7.08	4.90	2.28
AUSTRALIA	30.00	17.06	25.00	14.98	40.00	11.80	5.34	2.52
	Other Red Wine							
WORLD	2.09	1.19	2.04	1.11	2.20	1.04	2.25	1.02
U.S.A.	6.86	3.90	6.34	3.46	6.26	2.96	5.44	2.47
INTRA-EU-15	1.92	1.09	1.77	0.96	1.79	0.85	2.02	0.92
CHILE	4.08	2.32	3.90	2.12	4.19	1.98	3.07	1.39
SOUTH AFRICA	4.89	2.78	4.82	2.63	5.02	2.37	5.08	2.31
AUSTRALIA	7.62	4.33	6.51	3.55	6.26	2.96	5.96	2.70
	Liquor Wine							
WORLD	3.67	2.09	3.95	2.15	4.03	1.90	3.68	1.68
U.S.A.	30.26	17.21	36.73	20.01	85.86	40.54	13.06	5.92
INTRA-EU-15	3.66	2.08	3.93	2.14	4.01	1.89	3.61	1.65
SOUTH AFRICA	7.04	4.00	9.76	5.32	8.84	4.17	10.50	4.68
AUSTRALIA	5.53	3.15	36.09	19.66	20.50	9.68	16.34	7.48

	Sparkling Wine							
WORLD	6.55	3.72	6.62	3.61	6.21	2.93	5.35	2.44
U.S.A.	8.06	4.58	15.56	8.48	20.51	9.69	16.46	7.65
INTRA-EU-15	6.54	3.72	6.63	3.61	6.20	2.93	5.34	2.53
CHILE	7.50	4.27	5.71	3.11	17.14	8.09	7.60	3.60
SOUTH AFRICA	8.17	4.65	8.75	4.77	7.44	3.51	7.24	3.32
AUSTRALIA	8.30	4.72	8.25	4.50	16.32	7.71	12.34	5.63
	Vermouth							
WORLD	1.24	0.71	1.24	0.70	0.90	0.43	1.07	0.49
U.S.A.	4.90	2.79	4.68	2.55	10.00	4.70	0.55	0.24
INTRA-EU-15	1.79	1.02	1.79	0.98	1.08	0.51	1.64	0.76
	Wine Coolers							
WORLD	1.57	0.89	1.46	0.79	1.90	0.90	1.15	0.52
U.S.A.	4.37	2.49	5.74	3.13	5.51	2.60	4.30	1.97
INTRA-EU-15	1.30	0.74	1.22	0.67	1.56	0.74	0.98	0.44
SOUTH AFRICA	5.56	3.16	30.00	16.30	3.89	1.84	2.73	1.20
* Jan/Jul 2001								
Source: Federal Statistics Office								